



WISCONSIN

**DEPARTMENT OF WORKFORCE DEVELOPMENT**

Division of Economic Support  
Bureau of Welfare Initiatives

**TO: Economic Support Supervisors  
Economic Support Lead Workers  
Training Staff  
FSET Administrative and Provider Agencies  
Child Care Coordinators  
W-2 Agencies**

**BWI OPERATIONS MEMO**

**No.: 99-20**

**File: 2499  
2799  
2899  
7999**

**Date: 03/17/99**

**Non W-2 [x] W-2 [x] CC [x]**

**PRIORITY: Medium**

**FROM: Stephen M. Dow  
Program Implementation Team  
Policy Analysis and Program Implementation Section**

**SUBJECT: 1. EARNED INCOME CREDIT (EIC)  
2. INCOME TAX PREPARATION ASSISTANCE**

**EFFECTIVE DATE:** Immediately.

**PURPOSE**

This memo reminds Wisconsin Works (W-2) and economic support (ES) agencies of the importance of the Earned Income Credit as a resource to working low income families, and to inform staff of the availability of free tax preparation assistance.

**BACKGROUND**

Agencies have been regularly reminded to inform W-2 applicants and recipients, ES applicants and recipients, and other low income customers of the agency, of the availability of tax credits for working families. The most significant of these is the Earned Income Credit (EIC). For eligible families filing tax returns for 1998, the maximum federal credit is \$3,816, and the maximum state credit is \$1,640. Families that would have qualified for the credits in previous years, had they filed a tax return and requested the credit, may claim and receive credits for up to 3 previous years.

BWI has urged Economic Support and W-2 staff to be aware of these credits and to educate applicants and recipients of services as to the value of these credits. BWI has urged agencies to maintain self-help materials on EIC, and to refer individuals to the Internal Revenue Service's Volunteer Income Tax Assistance (VITA) sites for free tax preparation assistance. In addition, agencies are urged to alert potentially eligible individuals to the advance feature of the federal EIC so that a portion of the credit can be included in regular paychecks.

**ACTION REQUESTED**

In late February, the Taxpayer Education Office of the Internal Revenue Service sent a packet to W-2 agencies. The packet included a listing of this year's VITA sites, a 1999 W-5 form used for claiming the Advance EIC, and an outreach letter from the IRS.

Agencies are asked to share the IRS information with all public contact workers and to remind workers of the importance of referring customers to the sites. This is particularly important for customers who may be filing tax forms for the first time, and customers who may be filing substantially different tax returns than previously.

If a customer is going to use a VITA service, he or she should be reminded to bring appropriate documentation. The IRS suggests that individuals bring their form W-2, any additional income information, and the prior year's tax return (if any) to the VITA site.

People who did not file the prior year, but had earnings (even \$1) and qualify for EIC, can file for previous years. These individuals will need to use an IRS walk-in office, rather than VITA site for help in preparing prior year returns and will need to bring wage information for the previous years as well.

Here is a listing of IRS walk-in office locations and times. In this listing, the times for the filing season (January 1 through April 15) are indicated with "F/S"; times for the non-filing season (after April 15) are indicated as "Non-F/S".

**APPLETON**

|                     |                                |
|---------------------|--------------------------------|
| 1901 B East Capitol | F/S: Mon. thru Thurs., 8-4:30  |
|                     | Non-F/S: Mon. and Wed., 8-4:30 |

**EAU CLAIRE**

|                                     |                                |
|-------------------------------------|--------------------------------|
| 1320 Clairemont Avenue<br>Suite 200 | F/S: Mon./Wed./Fri., 8-4:30    |
|                                     | Non-F/S: Mon. and Wed., 8-4:30 |

**GREEN BAY**

|  |  |
|--|--|
| Allouez Central Plaza<br>1920 Libal Street | F/S: Mon. thru Fri., 8-4:30 and Sat., 8:30-12:30 |
|  | Non-F/S: Mon. and Wed., 8-4:30                   |

**JANESVILLE**

|                                 |                             |
|---------------------------------|-----------------------------|
| 101 East Milwaukee<br>Suite 418 | F/S: Mon. and Tues., 8-4:30 |
|                                 | Non-F/S: Closed             |

**LA CROSSE**

|                  |                             |
|------------------|-----------------------------|
| 425 State Street | F/S: Mon. and Tues., 8-4:30 |
|                  | Non-F/S: Same               |

**MADISON**

|                      |  |
|----------------------|--|
| 545 Zor Shrine Place | F/S: Mon. thru Fri., 8-4:30 and Sat., 8:30-12:30 |
|                      | Non-F/S: Mon. and Wed., 8-4:30                   |

*MILWAUKEE*

310 West Wisconsin Avenue

F/S: Mon. thru Fri., 8-4:30 and Sat., 8:30-12:30

Non-F/S: Mon. thru Fri., 8-4:30

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*RACINE*

6021 Durand Avenue

F/S: Mon./Wed./Fri., 8-4:30

Non-F/S: Mon. and Wed., 8-4:30

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*WAUKESHA*Goerke's Park Business Center  
20719 Watertown Road

F/S: Mon. thru Fri., 8-4:30 and Sat. 8:30-12:30

Non-F/S: Mon. thru Fri., 8-4:30

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